

US009420104B1

(12) United States Patent Lintner

(54) SYSTEMS AND METHODS FOR AN OMNI-CHANNEL ROUTING BROKER

(71) Applicant: salesforce.com, inc., San Francisco, CA

(US)

(72) Inventor: Andrew Lintner, Royal Oak, MI (US)

(73) Assignee: salesforce.com, inc., San Francisco, CA

(US)

(*) Notice: Subject to any disclaimer, the term of this patent is extended or adjusted under 35

U.S.C. 154(b) by 0 days.

(21) Appl. No.: **14/829,347**

(22) Filed: Aug. 18, 2015

(51) Int. Cl.

##04M 3/00 (2006.01)

##04M 5/00 (2006.01)

##04M 3/51 (2006.01)

##04L 29/08 (2006.01)

##04M 3/523 (2006.01)

(52) U.S. Cl.

CPC H04M 3/5191 (2013.01); G06Q 30/016 (2013.01); H04L 67/10 (2013.01); H04L 67/24 (2013.01); H04M 3/5232 (2013.01)

(58) Field of Classification Search

(56) References Cited

U.S. PATENT DOCUMENTS

5,577,188	A	11/1996	Zhu
5,608,872	A	3/1997	Schwartz et al
5,649,104	A	7/1997	Carleton et al.
5,715,450	A	2/1998	Ambrose et al.
5,761,419	A	6/1998	Schwartz et al.
5,819,038	A	10/1998	Carleton et al.
5,821,937	A	10/1998	Tonelli et al.
5,831,610	A	11/1998	Tonelli et al.
5,873,096	A	2/1999	Lim et al.

(10) Patent No.: US 9,420,104 B1 (45) Date of Patent: Aug. 16, 2016

5,918,159 5,963,953 6,092,083 6,161,149 6,169,534 6,178,425 6,189,011	A A A B1 B1 B1	6/1999 10/1999 7/2000 12/2000 1/2001 1/2001 2/2001	Fomukong et al. Cram et al. Brodersen et al. Achacoso et al. Raffel et al. Brodersen et al. Lim et al.
	B1 B1		

(Continued) OTHER PUBLICATIONS

Sesum-Cavic, "Applying Swarm Intelligence Algorithms for Dynamic Load Balancing to a Cloud Based Call Center," Self-Adaptive and Self-Organizing Systems (SASO), 2010 4th IEEE International Conference, 2010, http://ieeexplore.ieee.org/xpl/login.jsp?tp=&arnumber=5630066&url=http%3A%2F%2Fieeexplore.ieee.org%2Fxpls%2Fabs_all.jsp%3Farnumber%3D5630066, retrieved Jul. 1, 2015, pp. 2.

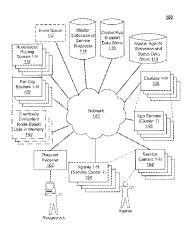
(Continued)

Primary Examiner — Thjuan K Addy (74) Attorney, Agent, or Firm — Haynes Beffel & Wolfeld LLP; Ernest J. Beffel, Jr.

(57) ABSTRACT

Omni-channel routing broker technology is usable to improve the experience for customers and for workers using service channels, especially for very large enterprise service operation centers that have large pools of agents, helping businesses determine the relative priority for handling a variety of service channels, and to efficiently route issues accordingly. Omni-channel routing broker includes intelligent routing of service requests in a large, distributed service center operation, efficiently prioritizing the routing of work across organizations to agents based on availability, capacity and priority—in a multi-tenant environment. The disclosed methods are usable for managing digital data for many tenants to software instances, including groups of users who share common access with a specific set of privileges to a software instance of at least one application. The disclosed technology makes possible the delivery of an improved performance from routing 3-4 requests per second to routing 100 requests per second.

25 Claims, 6 Drawing Sheets



US 9,420,104 B1 Page 2

(56)	Refere	nces Cited	8,484,111			Frankland et al.	
			8,490,025			Jakobson et al.	
U.S	S. PATENT	DOCUMENTS	8,504,945 1 8,510,045 1			Jakobson et al. Rueben et al.	
6 266 660 DI	7/2001	D	8,510,664			Rueben et al.	
6,266,669 B1 6,295,530 B1		Brodersen et al. Ritchie et al.	8,566,301			Rueben et al.	
6,324,568 B1	11/2001		8,646,103			Jakobson et al.	
6,324,693 B1		Brodersen et al.	8,756,275			Jakobson	
6,336,137 B1		Lee et al.	8,769,004			Jakobson	
D454,139 S		Feldcamp	8,769,017			Jakobson Hoan 2/52	
6,367,077 B1		Brodersen et al.	8,867,733	B1 * 10/2	2014	Conway H04M 3/523 379/265.0	
6,393,605 B1 6,405,220 B1		Loomans Brodersen et al.	9.160.858	B2 * 10/2	2015	Khouri H04M 3/523	
6,434,550 B1		Warner et al.	2001/0044791			Richter et al.	
6,446,089 B1		Brodersen et al.	2002/0072951			Lee et al.	
6,535,909 B1	3/2003	Rust	2002/0082892			Raffel et al.	
6,549,908 B1		Loomans	2002/0129352 2 2002/0140731 2			Brodersen et al. Subramaniam et al.	
6,553,563 B2		Ambrose et al.	2002/0143997			Huang et al.	
6,560,461 B1 6,574,635 B2		Fomukong et al. Stauber et al.	2002/0162090			Parnell et al.	
6,577,726 B1		Huang et al.	2002/0165742	A1 11/2	2002	Robins	
6,601,087 B1		Zhu et al.	2003/0004971			Gong et al.	
6,604,117 B2		Lim et al.	2003/0018705			Chen et al.	
6,604,128 B2	8/2003		2003/0018830 2 2003/0066031 2			Chen et al. Laane	
6,609,150 B2 6,621,834 B1		Lee et al. Scherpbier et al.	2003/0066032			Ramachandran et al.	
6,654,032 B1		Zhu et al.	2003/0069936			Warner et al.	
6,665,648 B2		Brodersen et al.	2003/0070000			Coker et al.	
6,665,655 B1		Warner et al.	2003/0070004			Mukundan et al.	
6,684,438 B2		Brodersen et al.	2003/0070005			Mukundan et al.	
6,711,565 B1		Subramaniam et al.	2003/0074418 2 2003/0120675 2			Coker Stauber et al.	
6,724,399 B1 6,728,702 B1		Katchour et al. Subramaniam et al.	2003/0120073			George et al.	
6,728,960 B1		Loomans	2003/0159136			Huang et al.	
6,732,095 B1		Warshavsky et al.	2003/0187921			Diec	
6,732,100 B1		Brodersen et al.	2003/0189600			Gune et al.	
6,732,111 B2		Brodersen et al.	2003/0204427 2003/0206192			Gune et al. Chen et al.	
6,754,681 B2		Brodersen et al.	2003/0206192			Warner et al.	
6,763,351 B1 6,763,501 B1		Subramaniam et al. Zhu et al.	2004/0001092			Rothwein et al.	
6,768,904 B2	7/2004		2004/0010489		2004		
6,772,229 B1		Achacoso et al.	2004/0015981		2004	Coker et al.	
6,782,383 B2		Subramaniam et al.	2004/0027388			Berg et al.	
6,804,330 B1		Jones et al.	2004/0128001 2 2004/0186860 2			Levin et al. Lee et al.	
6,826,565 B2 6,826,582 B1	11/2004	Ritchie et al. Chatterjee et al.	2004/0193510			Catahan et al.	
6,826,745 B2		Coker et al.	2004/0199489			Barnes-Leon et al.	
6,829,655 B1		Huang et al.	2004/0199536			Barnes Leon et al.	
6,842,748 B1	1/2005	Warner et al.	2004/0199543			Braud et al.	
6,850,895 B2		Brodersen et al.	2004/0249854 2004/0260534			Barnes-Leon et al. Pak et al.	
6,850,949 B2 7,062,502 B1		Warner et al. Kesler	2004/0260659			Chan et al.	
7,062,302 B1 7,069,231 B1		Cinarkaya et al.	2004/0268299			Lei et al.	
7,069,497 B1		Desai	2005/0050555			Exley et al.	
7,181,758 B1	2/2007	Chan	2005/0091098			Brodersen et al.	
7,289,976 B2		Kihneman et al.	2006/0021019 2 2008/0249972 2			Hinton et al. Dillon	
7,340,411 B2 7,356,482 B2	3/2008	Cook Frankland et al.	2009/0063415			Chatfield et al.	
7,330,482 B2 7,401,094 B1		Kesler	2009/0100342			Jakobson	
7,412,455 B2		Dillon	2009/0177744			Marlow et al.	
7,508,789 B2	3/2009		2011/0218958			Warshavsky et al.	
7,603,483 B2		Psounis et al.	2011/0247051 2 2012/0042218 2			Bulumulla et al. Cinarkaya et al.	
7,620,655 B2		Larsson et al.	2012/0042218 1			Jakobson et al.	
7,698,160 B2 7,779,475 B2		Beaven et al. Jakobson et al.	2012/0290407			Hubbard et al.	
7,851,004 B2		Hirao et al.	2013/0212497			Zelenko et al.	
7,899,177 B1	3/2011	Bruening et al.	2013/0247216	A1 9/2	2013	Cinarkaya et al.	
8,014,943 B2		Jakobson		OTHER	е РО	BLICATIONS	
8,015,495 B2		Achacoso et al.			,		
8,032,297 B2 8,073,850 B1		Jakobson Hubbard et al.				ordination Service for Distribute	ed
8,082,301 B2		Ahlgren et al.				vare Foundation, 2008, p. 1-10.	
8,095,413 B1		Beaven				and Practices—Version 34.0, Sur	n-
8,095,594 B2	1/2012	Beaven et al.	mer '15," @salest				
8,209,308 B2		Rueben et al.				force.com Help Portal (//hel	
8,209,333 B2		Hubbard et al.				developer.salesforce.com/page/D	a-
8,275,836 B2		Beaven et al.	tabase>, retrieved	i, Jun. 30,	ZU15,	pp. 3.	
8,295,471 B2 8,457,545 B2	6/2013	Spottiswoode et al.	* cited by exam	iner			
0,TJ1,JH3 D 2	0/2013	Chan	ched by exam	mici			

cited by examiner

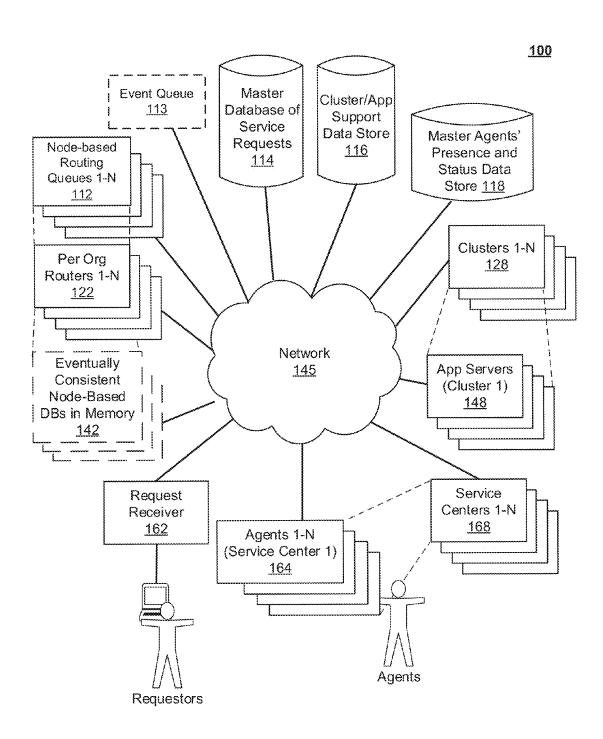


FIG. 1 Environment

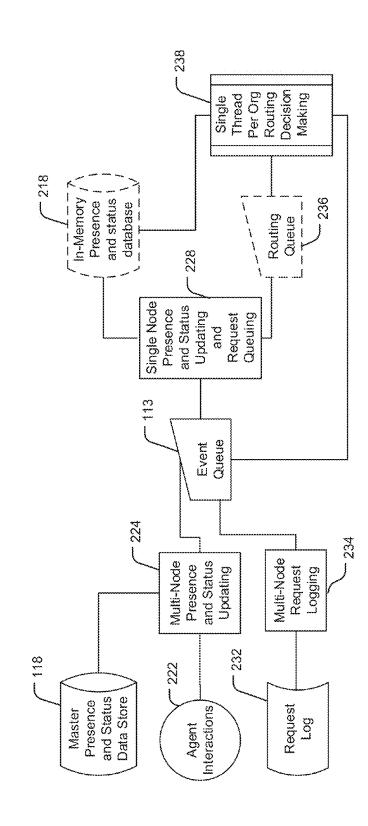


FIG. 2 Brokered Routing

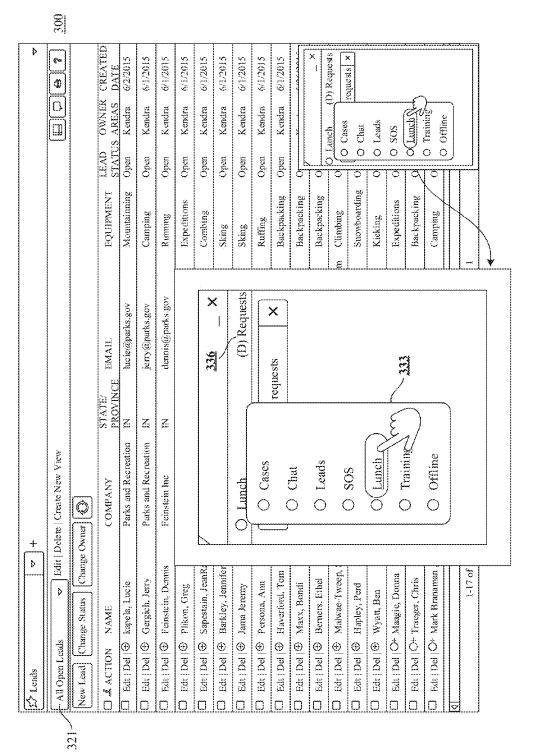


FIG.

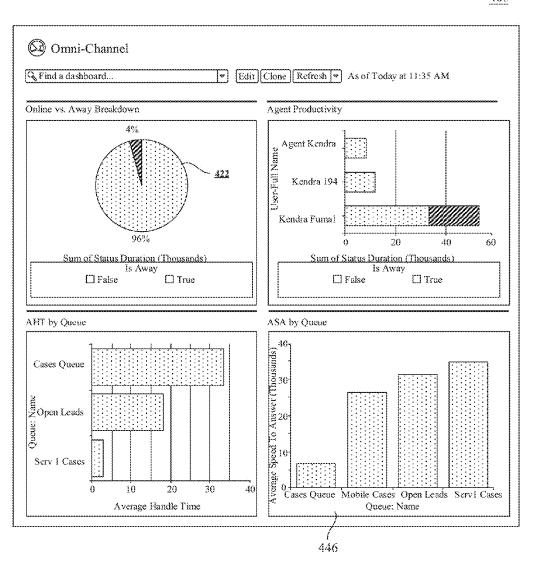
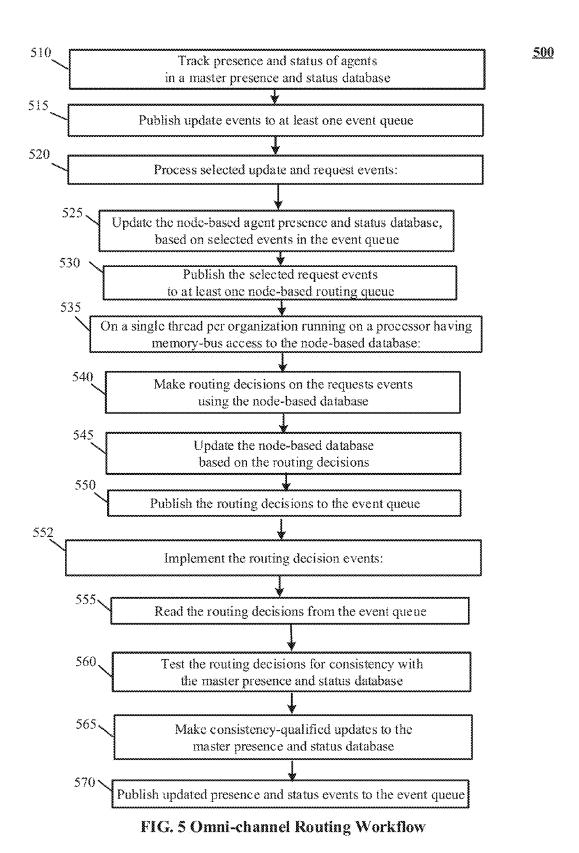


FIG. 4



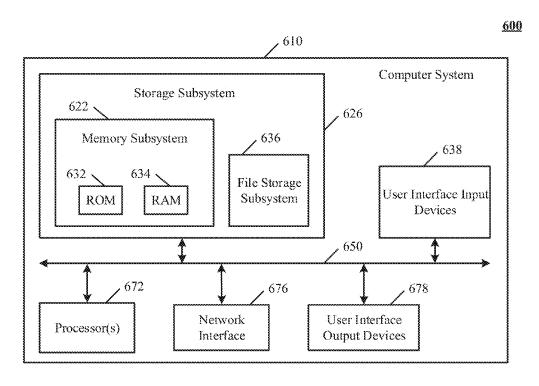


FIG. 6 Computer System

SYSTEMS AND METHODS FOR AN **OMNI-CHANNEL ROUTING BROKER**

FIELD OF DISCLOSURE

The technology disclosed describes systems and methods for intelligent routing of service requests in a large, distributed service center operation-efficiently prioritizing the routing of work across organizations to agents based on availability, capacity and priority, in a multi-tenant environment. 10 The methods disclosed include managing digital data for a plurality of tenants to software instances, each tenant of the plurality of tenants comprising a group of users who share a common access with a specific set of privileges to a software instance of at least one application.

The technology discloses systems and methods for an omni-channel routing broker.

INTRODUCTION

Customer service is moving toward a more personalized 1:1 communication with consumers, through the many channels and on the many devices they use. Omni-channel is a multichannel approach for providing customers with a seamless experience, whether the customer is interacting online 25 via email, web, short message service (SMS), chat, or live agent video support on a desktop or mobile device, by telephone, or in a brick and mortar store.

Historically, a series of requests for services have been stored in a database, as an event sequence—a queue of avail- 30 able work. Common techniques for routing work from the queue to agents include the following options: either agents pull work from the queue and assign it to themselves, or a supervisor assigns work to agents. Given that companies have extensive information about their agents—their capabilities, 35 the amount of work that is waiting, and how much work the agents already have in their queues—one goal is to intelligently route work to the agents. Methods of prioritizing include either 'most available agent': determining which agent is most available, based on a difference between their 40 capacity and the amount of work already in the agent's queue; and 'least active agent': prioritizing routing of work to an agent based purely on how much work an agent already has. Note that two agents can have different capacity amplitudes, based on various factors, such as number of work hours per 45 week, amount of work experience, or level of training.

Service channels for contact centers are evolving significantly for organizations. In this era of omni-channel, it is important for a business to determine the relative priority for handling a variety of service channels, and to efficiently route 50 to the figures. Sample implementations are described to illusissues accordingly.

In a multi-tenant environment, agents are potentially connected to different app servers, generating a need for keeping work queues synchronized. In order to select a preferred agent to receive any given piece of work, the system needs to 55 evaluate the availability of the agents in the org, their queue membership, their current workload, and the priority of the work. Making these selections in a multi-tenant environment with a high load of incoming work is difficult due to the concurrent nature of the updates made to the variables used to 60 perform agent selection and the distributed system that handles these requests. For example, for a routing system that searches to identify the agent with the least amount of current work, if two work request cases are pushed into a queue simultaneously, and we make routing decisions on two dif- 65 ferent app servers, then we could potentially push both pieces of work to the same agent, leaving that agent over-burdened.

2

Increasing bandwidth issues accompany routing requests across app servers, and synchronizing access to shared resources is a challenging problem that has relatively slow solutions, with limitations on throughput. Existing technology solves the limitation by segmenting contact centers, but a new approach is needed to allow very large scale service organizations to utilize a very large pool of agents. Some approaches break up distributed systems entirely, but with traffic served by a single app server with agents in an org connected to it, the size of the app server becomes a limiting

Speed and efficiency are two of the biggest drivers for customer service departments. The disclosed technology delivers an improved performance from routing 3-4 requests per second to routing 100 requests per second.

An opportunity arises to improve the experience for customers and for workers using disclosed omni-channel routing broker technology, including making it feasible for very large enterprise service operation centers to have very large pools 20 of agents.

BRIEF DESCRIPTION OF THE DRAWINGS

The included drawings are for illustrative purposes and serve only to provide examples of possible structures and process operations for one or more implementations of this disclosure. These drawings in no way limit any changes in form and detail that may be made by one skilled in the art without departing from the spirit and scope of this disclosure. A more complete understanding of the subject matter may be derived by referring to the detailed description and claims when considered in conjunction with the following figures, wherein like reference numbers refer to similar elements throughout the figures.

FIG. 1 illustrates one example implementation of an omnichannel routing broker environment.

FIG. 2 shows a brokered routing example.

FIG. 3 illustrates a user interface for an open lead interface, with an agent status window.

FIG. 4 shows an example user interface that displays agents' work history.

FIG. 5 shows an example omni-channel routing broker workflow.

FIG. 6 is a block diagram of an example computer system for implementing an omni-channel routing broker.

DETAILED DESCRIPTION

The following detailed description is made with reference trate the technology disclosed, not to limit its scope, which is defined by the claims. Those of ordinary skill in the art will recognize a variety of equivalent variations on the description that follows.

In one implementation, an omni-channel routing broker system includes selecting an app server among the cluster of app servers (pod) to perform routing for a given org. Event handling results are stored in a database, to fulfill a requirement of many large organizations for recording permanent and highly available event logs that enable event tracking, agent activity tracking, and performance analysis.

A cascading series of queues is used to avoid the reduction in throughput that would occur if the orgs were routed via a single thread in a single app server. The disclosed system separates routing decisions from the work required to commit routing decisions, delivering improved routing performance and service for customers.

Routine Broker Environment

FIG. 1 illustrates an example omni-channel routing broker environment 100 that includes a request receiver 162 for handling service requests from a plurality of organizations, via multiple sources: for example—email, web, SMS, chat, or live agent video support on a desktop or mobile device, or by telephone. Each organization has an agent pool disjoint from the agent pools of other organizations. Agents 1-N 164, at service center one, complete work requests received at service centers 1-N 168. Clusters of app servers 148 serve org clusters 1-N 128, storing event information and other log data in cluster/app support data store 116. In some implementations, organizations operate on a single pod. Clusters of servers that handle traffic exist as a logical unit sometimes referred to as a "superpod" which is a group of pods.

An app server among the cluster of app servers 148 is elected to perform routing for a given org. That app server will make the routing decisions for the org. A system could have a single app server for a hundred different orgs. That is, a given app server can serve many orgs. Each org has one or more work queues for their organization's agent pool. Cluster/app support data store 116 gets updated when agents complete tasks (i.e. close work) for their organizations.

Omni-channel routing broker environment 100 makes use of multithreading to manage requests from more than one user at a time, and to manage multiple requests by the same user-tracking the presence and status of agents for multiple orgs. Current presence and status for each agent is stored in master agents' presence and status data store 118, and presence and status update events are published to event queue 113

Omni-channel routing broker environment 100 in FIG. 1 also includes eventually consistent, in-memory node-based databases 142, which get updated based on the results of receiving agent presence and status events from event queue 113. For eventually consistent databases, changes to a replicated piece of data eventually reach the affected replicas. The master presence and status data store 118 can store agent presence and status data across agent pools serving multiple nodes; and the eventually consistent in memory node-based databases 142—are subsets of the master presence and status data store 118, as a result of processing events from the event queue.

Per org routers 1-N 122 publish incoming service request events from the event queue 113 to at least one of the node-based routing queues 1-N 112. Additionally, routing broker 50 environment 100 includes a master database of service requests 114 that provides a permanent record of events, enabling long-term event tracking and agent performance analysis.

In other implementations, environment 100 may not have 55 the same elements as those listed above and/or may have other/different elements instead of, or in addition to, those listed above.

The disclosed omni-channel routing broker technology, described in detail below, evaluates presence and status for 60 agents, and makes routing selections in a multi-tenant environment that handles a high volume of incoming work.

FIG. 2 shows an example brokered routing system. Master presence and status data store 118 includes data that specifies the availability and capabilities of each agent. In one example in which agents service sales leads for an organization, an agent's status can include a list of cases in the agent's queue,

4

an indicator showing availability for a live chat, and a list of leads being pursued by the agent. Availability can be disabled or dimmed when the agent selects a lunch or offline setting. Agent interactions 222 can include logging in, logging out, completing a task, changing their status such as 'lunch' or 'available for work', accepting work or closing work, new work coming in, or a new case created. Request log 232 stores the service requests generated via multi-node request logging 234

When an event comes from one of multiple threads on an app server, the event gets passed to a pool of listeners that processes the event and determines relevance, makes decisions, and adds a routing request to request log 232, as appropriate. Some events do not cause the addition of a routing request—such as events for orgs not of interest to the stream—because they require no routing decision. Events of interest include an agent doing something that changes their availability for work such as logging in; changing an agent's capacity for work such as closing work, etc.; or the addition of a new work request.

A service request event for an org can be stimulated by an agent requesting work, or by a service request being routed to push work to an agent. An example class for routing work from a pull request is shown below. The code identifies which queue has the most eligible piece of work to route for an agent based on priority and time in queue, and routes the pulled work to the agent.

```
30 class PullRouter extends AbstractRunner {
      public void route(PullRequest request) {
         RoutableBrokeredAgent agent = request.getAgent();
         while (agent.hasCapacity()) {
            //Evaluate queue priorities and other business rules to identify the
            RoutingResult work = queueRouter.findBestWorkForAgent(agent);
           if (work != null) {
              //Attempt to route the work and make changes to our local state.
              // Note: The actual changes to the data store will be committed
                asynchronously. Success here only indicates success
              // of the initial attempt.
              if (routeToAgent(agent, work, request, routeRequestHandler)) {
                 logSuccessfulRoute(agent, work);
            } else {
              //There was no work to route, exit the loop
              break:
       private boolean routeToAgent(RoutableBrokeredAgent agent,
    RoutingResult work, RoutingRequest request, RouteRequestHandler
    routeRequestHandler)
         //Remove the pendingServiceRouting object from our local state
         QueuedPsr psr =
    routeRequestHandler.getQueuesState(\ ).take(work.getWinningItem(\ ));
         if (psr != null) { //If there was concurrent modification and we lost
    this, it's okay - we'll come through on the next loop
            QueueId queueId = work.getWinningQueue( ).getQueueId( );
            long capacityImpact = agent.getQueueManager().getIm-
    pact(queueId);
            // Update the local agent state to remove capacity for this pending
    work. We'll later commit this or roll it back.
           agent.getWorkManager().consumePending(capacityImpact);
              // Enqueue the routing result to be processed asynchronously
              routeRequestHandler.addRoutingResult(agent, queueId, psr,
    capacityImpact);
              return true;
            } catch (Exception e) {
              logException(e);
              agent.getWorkManager().restorePending(capacityImpact);
65 //Rollback the capacity impact
              routeRequestHandler.addAll(Collections.singleton(request));
```

-continued

```
//Add the routing request back to the queue to be retried later

}
return false;
}
```

An implementation of handling a routing result from the org's router is shown in the code snippet listed below. If a problem is encountered during the routing, then the work gets restored to the queue, and the pending agent's capacity gets restored. In one case, if the work is unavailable due to a concurrent modification, the agent's capacity gets restored. In another case, if the agent concurrently modifies their status to one that should not receive this work, the agent's capacity gets restored. In both cases, the routing request gets added back to the queue to be retried later. Alternatively, if the routing conditions are successfully met, then the route success marker gets activated.

```
public\ class\ RoutingResultHandler\ \{
  public void handleRoutingResult(RoutingRequest request,
RoutingResult result) {
    CompletableFuture<WorkRoutedResponse> responseFuture =
executeCustomerValidation(result)
       .exceptionally((exception) ->
Work Routed Response. failed Exceution (exception)) \\
       .thenApplyAsync(commitToDataStore())
       .exceptionally((exception) ->
WorkRoutedResponse.failedExceution(exception))
       .thenApplyAsync(commitToSharedState())
       .exceptionally((exception) -> rollbackDataStoreChange(excep-
tion))
       .thenAcceptAsync((response) -> {
         if (response.failedExceptionally())
            resyncLocalState(); //Something has become out of sync in an
unexpected way. Re-sync the local state from the shared state.
         if (response.result == WORK\_UNAVAILABLE) \, \big\{
            //The work was unavailable due to a concurrent modification.
Restore the agent's capacity and move on
result.getAgent().getWorkManager().restorePending(result.getCapacityIm-
pact());
          } else if (response.result == WRONG_AGENT_STATUS) {
            //The agent concurrently modified their status to one that
should not receive this work.
            // Restore the agent's capacity and put the work back in the
queue result.getAgent().getWorkManager().restorePending(result.getCa-
pacityImpact()); //Rollback the capacity impact
            route Request Handler. add All (Collections. singleton (request)); \\
//Add the routing request back to the queue to be retried later
         } else
            publish WorkRoutedEvent( );
    });
```

Routers may not be constantly running. If a routing request is the first one in the queue for the particular organization, a router spin-up request event is generated, which causes spin-up of a router for a particular org. Per org routing requests are handled in a non-blocking fashion using the in-memory state 60 snapshot, in order to quickly return the thread for further processing.

Multi-node presence and status updating 224 captures changes in agents' states, such as the completion of a task, and provides the changes to the event queue 113.

In one implementation of the disclosed system, a single router per org runs at any snapshot in time. An advantage of 6

this single-router-per-org approach is the ability to route events serially. Single node presence and status updating and request queuing 228 updates an eventually consistent, inmemory subset of the master agent presence and status database 218 and at least one in-memory node-based routing queue 236. Single thread per org routing decision making 238 includes receiving incoming service requests from the node-based routing queue 236; and making routing decisions on the incoming service requests using the in-memory subset of the master agent presence and status database 218. The eventually consistent, in-memory subset of the master agent presence and status database 218 gets updated to reflect the routing decisions; and the routing decisions get published to the event queue 113.

Implementing the routing decisions applicable to the agent pools across the multiple nodes includes receiving routing decisions from the event queue 113, and testing the routing decisions for consistency with the master agent presence and status data store 118. Confirming consistency includes looking at the in-memory node-based routing queue 236 and in-memory presence and status database 218, and determining whether to roll back the route or to commit the route, based on whether the master presence and status data store 118 is consistent with in-memory node-based routing queue 236. Consistency-qualified updates are made to the master agent presence and status data store 118 and updated status events are published to event queue 113.

For some implementations, validation rules provided by an organization affect which of the decisions made during single node presence and status updating and request queuing 228 get applied to routing work, via service requests, to agents. Customer code can include Apex triggers or validation rules that affect the ultimate routing decision. For example, some organizations implement rules for fulfillment of customer orders and for processing claims made relative to customers' orders: 'manager' level permissions may be required for an agent who approves service requests that include refunds for customers.

Once the routing decision has been made; results are stored in the master presence and status data store 118; customer code has been executed successfully; and consistency has been confirmed, then the route is considered committed. The service request routing the work to that agent is posted to the event stream, and the agent receives notification that they have work. The agent 'listening' to the event stream learns that they have work.

In the case of lack of consistency between a particular routing decision and the master presence and status data store 118, a routing decision rollback event is published to the event queue 113, and the particular routing decision is not applied to the master presence and status data store 118. The node-based database—the in-memory presence and status database 218—gets updated to roll back the routing decision. That is, if unsuccessful, the state changes are rolled back and the work is made available for another routing attempt. For example, if an agent has gone offline during the routing of the request, then we learn that the agent is not available when we try to commit the route to the database, so the route will be rolled back as though it never happened and a new routing request will be generated.

App servers within a cluster keep a connection open to each other and ping periodically to be sure they are "up". In one implementation, if an app server drops out of the pool, the remaining distributed processes coordinate with each other and elect a new app server to serve that org as router. That is, app server selection can be updated if cluster members

change over time. A new leader can be elected if the app server that runs the routing decision maker goes offline.

A distributed commit log can handle hundreds of megabytes of reads and writes per second from thousands of clients. In one example implementation, a single Apache Kafka 5 broker can allow a single cluster to serve as the central data backbone for a large enterprise organization. The commit log can be elastically and transparently expanded without downtime. Data streams can be partitioned and spread over a cluster of machines to allow data streams larger than the capability of any single machine and to allow clusters of coordinated consumers.

An example user interface for a multi-tenant, multi-threaded omni-channel routing broker system is shown in FIG. 3. The screenshot shows a webpage that an agent accepting work might view, of Leads known to the organization. In this case, open leads 321 are listed. Also, a zoom in of an agent options popup, located in the bottom right corner of the page, shows agent options 333. As discussed earlier in this application, cases, chat leads, SOS (for mobile device support), lunch, training and offline are options available to the agent. When a service request has been successfully pushed to the agent, the requests count will show the addition of a new request 336. Agents can also set their availability to receive work and view incoming requests; and can choose to accept or decline work based on setup for the org, when the widget flashes or rings.

FIG. 4 shows an example user interface, for data reporting and analysis, that displays the results of an agent's work over time. Data can be gleaned from the master agents' presence 30 and status data store 118, and from the request log 232 and productivity can be displayed. In this example UI, online versus away breakdown 422 displays the agent's data: the agent was away 4% of the time (based on a sum of status durations in thousands). Average speed of answer (ASA) by 35 queue 446 shows average speed to answer for a cases queue, mobile cases, open leads and sev 1 cases.

While the technology disclosed is disclosed by reference to the preferred embodiments and examples detailed above, it is to be understood that these examples are intended in an illustrative rather than in a limiting sense. It is contemplated that modifications and combinations will readily occur to those skilled in the art, which modifications and combinations will be within the spirit of the invention and the scope of the following claims.

Omni-Channel Routine Broker Workflow

FIG. 5 shows an example workflow 500 of one implementation of an omni-channel routing broker—routing service requests in a large, distributed service center, across multiple nodes having disjoint memory spaces. Workflow 500 can be 50 implemented at least partially with a database system, e.g., by one or more processors configured to receive or retrieve information, process the information, store results, and transmit the results. Other implementations may perform the steps in different orders and/or with different, fewer or additional 55 steps than the ones illustrated in FIG. 5. Multiple steps can be combined in some implementations.

At action **510**, track the presence and status of agents in a plurality of disjoint agent pools. At action **515**, publish update events to at least one event queue.

At action 520, process selected update and request events, as described in actions 525 through 550.

At action **525**, update the node-based database from the selected update events; and at action **530**, publish the selected request events to at least one node-based routing queue.

At action 535, on a single thread per organization running on a processor having memory-bus access to the node-based 8

database: make routing decisions on the requests events using the node-based database and at action **540**, update the nodebased database accordingly. At action **545**, publish routing decision events to the event queue.

At action 552, implement the routing decision events: at action 555, test the routing decision events for consistency with a master agent presence and status database; and at action 555, make consistency-qualified updates to the master agent presence and status database. At action 570, publish the consistency-qualified update events.

Computer System

FIG. 6 is a block diagram of an example computer system 600 for implementing an omni-channel broker. FIG. 6 is a block diagram of an example computer system, according to one implementation. The processor can be an ASIC or RISC processor. It can be an FPGA or other logic or gate array. It can include graphic processing unit (GPU) resources. Computer system 610 typically includes at least one processor 672 that communicates with a number of peripheral devices via bus subsystem 650. These peripheral devices may include a storage subsystem 624 including, for example, memory devices and a file storage subsystem, user interface input devices 638, user interface output devices 676, and a network interface subsystem 674. The input and output devices allow user interaction with computer system 610. Network interface subsystem 674 provides an interface to outside networks, including an interface to corresponding interface devices in other computer systems.

User interface input devices 638 may include a keyboard; pointing devices such as a mouse, trackball, touchpad, or graphics tablet; a scanner; a touch screen incorporated into the display; audio input devices such as voice recognition systems and microphones; and other types of input devices. In general, use of the term "input device" is intended to include the possible types of devices and ways to input information into computer system 610.

User interface output devices 676 may include a display subsystem, a printer, a fax machine, or non-visual displays such as audio output devices. The display subsystem may include a cathode ray tube (CRT), a flat-panel device such as a liquid crystal display (LCD), a projection device, or some other mechanism for creating a visible image. The display subsystem may also provide a non-visual display such as audio output devices. In general, use of the term "output device" is intended to include the possible types of devices and ways to output information from computer system 610 to the user or to another machine or computer system.

Storage subsystem **624** stores programming and data constructs that provide the functionality of some or all of the methods described herein. This software is generally executed by processor **672** alone or in combination with other processors.

Memory 622 used in the storage subsystem can include a number of memories including a main random access memory (RAM) 634 for storage of instructions and data during program execution and a read only memory (ROM) 632 in which fixed instructions are stored. A file storage subsystem 636 can provide persistent storage for program and data files, and may include a hard disk drive, a floppy disk drive along with associated removable media, a CD-ROM drive, an optical drive, or removable media cartridges. The software used to implement the functionality of certain systems may be stored by file storage subsystem 636 in the storage subsystem 624, or in other machines accessible by the processor.

Bus subsystem 650 provides a mechanism for letting the various components and subsystems of computer system 610

communicate with each other as intended. Although bus subsystem 650 is shown schematically as a single bus, alternative implementations of the bus subsystem may use multiple busses.

Computer system **610** can be of varying types including a workstation, server, computing cluster, blade server, server farm, or any other data processing system or computing device. Due to the ever-changing nature of computers and networks, the description of computer system **610** depicted in FIG. **6** is intended only as one example. Many other configurations of computer system **610** are possible having more or fewer components than the computer system depicted in FIG.

Particular Implementations

In one implementation, a method of routing service 15 requests in a large, distributed service center includes, across multiple nodes having disjoint memory spaces, tracking presence and status of agents in a plurality of disjoint agent pools and publishing update events to at least one event queue. The method also includes processing selected update and request 20 events, including updating the node-based database from the selected update events, and publishing the selected request events to at least one node-based routing queue, across one or more processors that have access to a node-based database used to track agent presence and status in one or more disjoint 25 agent pools. The method further includes making routing decisions on the requests events using the node-based database and updating the node-based database accordingly; and publishing routing decision events to the event queue—on a single thread per organization running on a processor having 30 memory-bus access to the node-based database. The method additionally includes implementing the routing decision events, including testing the routing decision events for consistency with a master agent presence and status database; and making consistency-qualified updates to the master agent 35 presence and status database and publishing update events accordingly.

In some implementations of the method of routing service requests in a large distributed service center, the master presence and status database stores agent presence and status data 40 across agent pools serving the multiple nodes; and the nodebased database is a subset of the master presence and status database that is eventually consistent with the master presence and status database as a result of processing events from the event queue. The method further includes processing the 45 selected update and request events from the event queue; and on the single thread per organization, reading service request events from the node-based routing queue.

In one implementation, a method of routing service requests in a large, distributed service center applies to managing digital data for a plurality of tenants to software instances, each tenant of the plurality of tenants comprising a group of users who share a common access with a specific set of privileges to a software instance of at least one application, wherein each tenant includes one or more of the organizations

In some implementations, the method is enhanced by further including the distributed service center handling service requests for a plurality of organizations, each organization having an agent pool disjoint from agent pools of other organizations, and having one or more work queues for the organization's disjoint agent pool.

The method further includes tracking the presence and status of agents in the master presence and status database using multiple threads per node on the multiple nodes; and updating the node-based database and publishing to the node-based routing queue using multiple threads.

10

The method additionally includes, in case of lack of consistency between a particular routing decision and the master presence and status database: publishing a routing decision rollback event to the event queue and not applying the particular routing decision to the master presence and status database; and updating the node-based database to roll back the routing decision.

In some implementations of the method of routing service requests in a large distributed service center, the agent pool serving the organization includes agents working on a plurality of app servers, the method further including: operating a single thread for routing service requests to the agent pool serving the organization across the plurality of app servers used by the agent pool.

In some implementations, the method is enhanced by further including an agent pool serving the organization that includes agents working on a plurality of app servers, geographically disbursed across pods operating in different data centers, the method further including: operating a single thread for routing service requests to the agent pool serving the organization across the plurality of app servers, geographically disbursed across pods operating in different data centers, used by the agent pool.

Other implementations may include a computer implemented system to perform any of the methods described above, the system including a processor, memory coupled to the processor, and computer instructions loaded into the memory.

Yet another implementation may include a tangible computer readable storage medium including computer program instructions that cause a computer to implement any of the methods described above. The tangible computer readable storage medium does not include transitory signals.

While the technology disclosed is disclosed by reference to the preferred embodiments and examples detailed above, it is to be understood that these examples are intended in an illustrative rather than in a limiting sense. It is contemplated that modifications and combinations will readily occur to those skilled in the art, which modifications and combinations will be within the spirit of the innovation and the scope of the following claims.

What is claimed is:

1. A method of routing of service requests in a large, distributed service center, the method including:

across multiple nodes having disjoint memory spaces, tracking presence and status of agents in a plurality of disjoint agent pools and publishing update events to at least one event queue;

across one or more processors that have access to a nodebased database used to track agent presence and status in one or more disjoint agent pools, processing selected update and request events, including:

updating the node-based database from the selected update events; and

publishing the selected request events to at least one node-based routing queue;

on a single thread per organization running on a processor having memory-bus access to the node-based database: making routing decisions on the request events using the node-based database and updating the node-based database accordingly; and

publishing routing decision events to the event queue; implementing the routing decision events, including:

testing the routing decision events for consistency with a master agent presence and status database; and

making consistency-qualified updates to the master agent presence and status database and publishing update events accordingly.

- 2. The method of claim 1, wherein:
- the master presence and status database stores agent pres- 5 ence and status data across agent pools serving the multiple nodes; and
- the node-based database is a subset of the master presence and status database that is eventually consistent with the master presence and status database as a result of processing events from the event queue.
- 3. The method of claim 1, further including:
- processing the selected update and request events from the event queue; and
- on the single thread per organization, reading service request events from the node-based routing queue.
- 4. The method of claim 1, wherein the distributed service center handles service requests for a plurality of organizations, each organization having an agent pool disjoint from 20 agent pools of other organizations, and having one or more work queues for the organization's disjoint agent pool.
 - 5. The method of claim 1, further including:
 - tracking the presence and status of agents in the master presence and status database using multiple threads per 25 node on the multiple nodes; and
 - updating the node-based database and publishing to the node-based routing queue using multiple threads.
 - 6. The method of claim 1, further including:
 - in case of lack of consistency between a particular routing 30 decision and the master presence and status database: publishing a routing decision rollback event to the event queue and not applying the particular routing decision to the master presence and status database; and
 - updating the node-based database to roll back the rout- 35 ing decision.
- 7. The method of claim 1, applied to managing digital data for a plurality of tenants to software instances, each tenant of the plurality of tenants comprising a group of users who share a common access with a specific set of privileges to a software 40 instance of at least one application, wherein each tenant includes one or more of the organizations.
- 8. The method of claim 1, wherein the agent pool serving the organization includes agents working on a plurality of app servers, the method further including:
 - operating a single thread for routing service requests to the agent pool serving the organization across the plurality of app servers used by the agent pool.
- 9. The method of claim 1, wherein the agent pool serving the organization includes agents working on a plurality of app 50 servers, geographically disbursed across pods operating in different data centers, the method further including:
 - operating a single thread for routing service requests to the agent pool serving the organization across the plurality operating in different data centers, used by the agent
- 10. A system of routing of service requests in a large, distributed service center, the system including:
 - a processor, memory coupled to the processor, and com- 60 puter instructions loaded into the memory that, when executed, cause the processor to implement a process that includes:
 - across multiple nodes having disjoint memory spaces, tracking presence and status of agents in a plurality of 65 disjoint agent pools and publishing update events to at least one event queue;

12

- across one or more processors that have access to a nodebased database used to track agent presence and status in one or more disjoint agent pools, processing selected update and request events, including:
 - updating the node-based database from the selected update events; and
 - publishing the selected request events to at least one node-based routing queue;
- on a single thread per organization running on a processor having memory-bus access to the node-based database: making routing decisions on the requests events using the node-based database and updating the node-based database accordingly; and

publishing routing decision events to the event queue; implementing the routing decision events, including:

- testing the routing decision events for consistency with a master agent presence and status database; and
- making consistency-qualified updates to the master agent presence and status database and publishing update events accordingly.
- 11. The system of claim 10, wherein:
- the master presence and status database stores agent presence and status data across agent pools serving the multiple nodes; and
- the node-based database is a subset of the master presence and status database that is eventually consistent with the master presence and status database as a result of processing events from the event queue.
- **12**. The system of claim **10**, further including:

processing the selected update and request events from the event queue; and

- on the single thread per organization, reading service request events from the node-based routing queue.
- 13. The system of claim 10, wherein the distributed service center handles service requests for a plurality of organizations, each organization having an agent pool disjoint from agent pools of other organizations, and having one or more work queues for the organization's disjoint agent pool.
 - 14. The system of claim 10, further including:
 - tracking the presence and status of agents in the master presence and status database using multiple threads per node on the multiple nodes; and
 - updating the node-based database and publishing to the node-based routing queue using multiple threads.
 - 15. The system of claim 10, further including:
 - in case of lack of consistency between a particular routing decision and the master presence and status database: publishing a routing decision rollback event to the event queue and not applying the particular routing decision to the master presence and status database; and
 - updating the node-based database to roll back the routing decision.
- 16. The system of claim 10, applied to managing digital of app servers, geographically disbursed across pods 55 data for a plurality of tenants to software instances, each tenant of the plurality of tenants comprising a group of users who share a common access with a specific set of privileges to a software instance of at least one application, wherein each tenant includes one or more of the organizations.
 - 17. The system of claim 10, wherein the agent pool serving the organization includes agents working on a plurality of app servers, the system further including:
 - a single thread, for routing service requests to the agent pool serving the organization, operated across the plurality of app servers used by the agent pool.
 - 18. A tangible computer readable storage medium loaded with computer instructions that, when executed, cause a com-

puter system to perform actions that route service requests in a large, distributed service center, the actions including:

across multiple nodes having disjoint memory spaces, tracking presence and status of agents in a plurality of disjoint agent pools and publishing update events to at least one event queue;

across one or more processors that have access to a nodebased database used to track agent presence and status in one or more disjoint agent pools, processing selected update and request events, including:

updating the node-based database from the selected update events; and

publishing the selected request events to at least one node-based routing queue;

on a single thread per organization running on a processor having memory-bus access to the node-based database: making routing decisions on the requests events using the node-based database and updating the node-based database accordingly; and

publishing routing decision events to the event queue; implementing the routing decision events, including:

testing the routing decision events for consistency with a master agent presence and status database; and

making consistency-qualified updates to the master agent presence and status database and publishing ²⁵ update events accordingly.

19. A tangible computer readable storage medium of claim 18, wherein:

the master presence and status database stores agent presence and status data across agent pools serving the multiple nodes; and

the node-based database is a subset of the master presence and status database that is eventually consistent with the master presence and status database as a result of processing events from the event queue.

20. The tangible computer readable storage medium of claim 18, further including:

processing the selected update and request events from the event queue; and

on the single thread per organization, reading service 40 request events from the node-based routing queue.

14

- 21. The tangible computer readable storage medium of claim 18, wherein the distributed service center handles service requests for a plurality of organizations, each organization having an agent pool disjoint from agent pools of other organizations, and having one or more work queues for the organization's disjoint agent pool.
- 22. The tangible computer readable storage medium of claim 18, further including:
 - tracking the presence and status of agents in the master presence and status database using multiple threads per node on the multiple nodes; and
 - updating the node-based database and publishing to the node-based routing queue using multiple threads.
- ${\bf 23}$. The tangible computer readable storage medium of claim ${\bf 18}$, further including:

in case of lack of consistency between a particular routing decision and the master presence and status database: publishing a routing decision rollback event to the event queue and not applying the particular routing decision to the master presence and status database; and

updating the node-based database to roll back the routing decision.

- 24. The tangible computer readable storage medium of claim 18, applied to managing digital data for a plurality of tenants to software instances, each tenant of the plurality of tenants comprising a group of users who share a common access with a specific set of privileges to a software instance of at least one application, wherein each tenant includes one or more of the organizations.
- 25. The tangible computer readable storage medium of claim 18, wherein the agent pool serving the organization includes agents working on a plurality of app servers, geographically disbursed across pods operating in different data centers, the computer readable storage medium further including:
 - a single thread operated for routing service requests to the agent pool serving the organization across the plurality of app servers, geographically disbursed across pods operating in different data centers, used by the agent pool.

* * * * *